

# Uploading Budget Templates in Hyperion

Version: 8.0 Updated: 09/25/2023

# Purpose

This Supplemental Job Aid provides instructions to upload a Budget Request (BR).

# **Table of Contents**

Purpose	
Target Audience1	
Key Points1	
Create a BR in Hyperion (CalPLNXX) where the data will be loaded	
Obtain and populate the latest available upload template in Excel (master) from Department of Finance	)
Save an extra copy of the populated Excel template (Smart View), which you will use to connect and upload the data to Hyperion	
Copy and paste your data from your master template (the original one with your source data) into the Smart View version, and upload the connected version	
Validate loaded data in Hyperion to ensure that all of your data was correctly uploaded21	
Appendix	,
Key Words	
Reference Materials	
Revision Table	
Contacts	

## **Target Audience**

All FI\$Cal roles with write access to the Hyperion Planning Application.

### **Key Points**

Note that using upload templates is likely most effective or efficient when a user has more than 20 lines of budget data to enter for a request (such as multiple



appropriations, programs, fund sources, or categories of spending data). The four BR types for which upload templates can be used are: Baseline Budget Adjustment (BBA), Budget Change Proposal (BCP), Enrollment, Caseload, and Population (ECP), and Revenues, Transfers, and Loans (RTL). There are separate and distinct upload templates available from your respective Department of Finance (Finance) Budget Analyst or by subscribing to Finance's Budget Operations mailing list for each of these BR types (exception: ECP BRs use the BCP upload template).

To subscribe to the Budget Operations mailing list, register here:

Subscribe to Budget Operations emails

The following five general steps need to be performed to upload each individual BR.

# Create a BR in Hyperion (CalPLNXX) where the data will be loaded

CalPLN21 is used when building the 2021-22 Budget, CalPLN22 is used when building the 2022-23 Budget, CalPLN23 is used when building the 2023-24 Budget, etc. In this example, we will be using **CalPLN21** as this BCP is proposed to be included in the 2021-22 Budget.

Steps	Description	
1	Log into Hyperion and click	on CalPLNXX under Applications Planning.
	Applications	
	A Planning	
	CalPLN17	
	CalPLN18	
	CalPLN19	
	CalPLN20	
	CalPLN21	

2 Click on the **Budget BR Types arrow**, then click on the **BCP** option under Budget BR Types in the My Task List page. (In this example, we use the BCP BR type. However, users must select the appropriate BR type, such as BBA, ECP, etc., as applicable.)



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3	Select appropriate <b>Version</b> and <b>Entity</b> from the drop-down menus, and verify that the default <b>fiscal year</b> (located just above and to the right of the Entity drop-down box) is that of the Budget being built. In this example, we selected <b>MR Dept Working</b> for <b>Version</b> , <b>0820-Department of Justice</b> for <b>Entity</b> , and <b>2021-22</b> for <b>Year</b> (default). Click the <b>Go</b> button (the arrow sign directly to the right of the Entity name drop-down box).
	Forms     Task List Status       My Task List Status     Task - BCP       Budget BR Types     Task Instructions       ECP     BR Dept Working       ECP     BR Name       BR Title     Copy BR       Invalid BR Types     Br Title
4	Right click on the white area under the column labeled BR Name. A drop-down box containing several clickable options will appear. Click on the <b>Create BR-BCP</b> option from the drop-down menu.
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	Task - BCP Task Instructions
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5	Select " <b>OK</b> " from the Launch Confirmation Message window.



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# Obtain and populate the latest available upload template in Excel (master) from Department of Finance

Finance distributes upload templates for a BCP, BBA, RTL, and ECP BR (Note: the BCP upload template is also used for an ECP BR) twice a year (after Governor's Budget [late January/early February] for the spring budget process and after Budget Enactment [late July/early August] for the fall budget development process) to the Budget Operations mailing list. To receive the latest upload templates, please sign up to receive emails from the Budget Operations mailing list here:

<u>https://dof.ca.gov/department-mailing-lists/</u> or contact your respective Finance Budget Analyst.

In this example, because we are creating a BCP BR, we will use the "BCP Excel Upload Template Workbook."

#### Steps | Description

1 On the **Budget Request Details** tab, in the cells next to the **Enter Budget Request Name** and **Budget Request Title**, enter the BR Name and BR Title that correspond to the BR you created in Hyperion. In this example, we use **0820-113-BCP-2021-MR** as the BR name and **Implementation of ABC Project** as the BR title. Click in the blue cell next to **Enter Request ID** and click on the arrow drop-down. Scroll down and select the Unique BR Identifer number that you wrote down.) In this example, we use **BR 0113**. The Version and Year will be prepopulated (however, please ensure that the version and year correspond with the version and fiscal year noted). Click in the blue cell next to **Enter Entity** and click on the arrow drop-down to select your Entity. In this example, we use MR Dept Working for version, 2021-22 for Year, and **0820-Department of Justice** for Entity. A user can select other versions and entities as appropriate.



Enter Budget Request Name	0820-113-BCP-2021-MR	
Budget Request Title	Implementation of ABC Project	
Enter Request ID	BR 0113	
Enter Version	MR Dept Working	
Enter Year	2021-22	
Enter Entity	0820-Department of Justice	
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	values in these cells.	
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2 Input position and expenditure data. (In this example, we use the BCP template and only input position and expenditure data. Note: Revenue data is entered in a RTL template). As such, **data** was entered in the **Position Change Request**, **BY-BY4 Position Summary**, and **BY-BY4 Expenditures** tabs.







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4

Users should click on the **Checklist Detail** tab to see the rows where the errors exist. In this example, there are **duplicate entries in rows 31 and 32** in the **BY-BY4 Expenditures** tab. Correct any errors and re-verify the **Checklist** tab again to make sure that any error messages have been addressed.

AC	AJ AK	AX	AV	66	BC
	BY-BY4 Expenditures Tab				
Fix Invalids Y Expenditures Tab)	Item (BY-BY4 Expenditures Tab)	Row Number (BY-BY4 Expenditures Tab)	Fix Duplicates (BY-BY4 Expenditures Tab)	Fix Incompletes (BY-BY4 Expenditures Tab)	Fix Invalids (BY-BY4 Expenditure Tab)
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	0820 001 0001	Row 17			
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	0820 001 0567	Row 31	FIX DUPLICATE ENTRY		
	0820 001 0567	Row 32	FIX DUPLICATE ENTRY		
		NOTE AN			
		Row 34			
		Row 35			
		Row 36			
		Row 37			
		Row 38			
Checkist	Checklist Detail	Row 39 t Request Details Workload M	leasures Program Budget Mea	sures Position Change Reques	CY Position Summary

N. Stranger		20.000 M (20.000	- The second		Estimated Savings BY	Estimated Carryover BY	Request Amount BY1	Request Amount 8Y2	Request Amount BY5	Request Amount BY
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9820 001 0003	EW 2021	0435010-Civil Law	\$339490-Travel - In State - Other	\$6,000		A	\$5,000	\$0,000	\$0,000	\$0,00
820 012 0001	EWY 2023	0433028-Public Rights	5535490-Travel - In State - Other	50,000			50,000	50,000	50,000	50,00
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Note: Once errors are corrected, the Crossties and Critical Issues Checklist cells in the **Checklist** tab should read, "No Issues".

	Current Year	Budget Year	Budget Year 1	Budget Year 2	Budget Year 3	Budget Year
Position related tases FTEs tie between Position Change Request and Position Summary tabs?	No traver	No issues	No Issues	No Issues	No Issues	No Iss
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Request by Category-related Issues	Current Year	9.4	Budg	et Year to Budget	Year 4	
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omplete Entries	No Issues			No issues		
alid Account Category	No Issues			No issues		
BU/BR Naming Mismatch	Proposed BR	BU	Issues			
es BR Request match BU	0820-113-BCP-2021-MR	0820	No Issues			

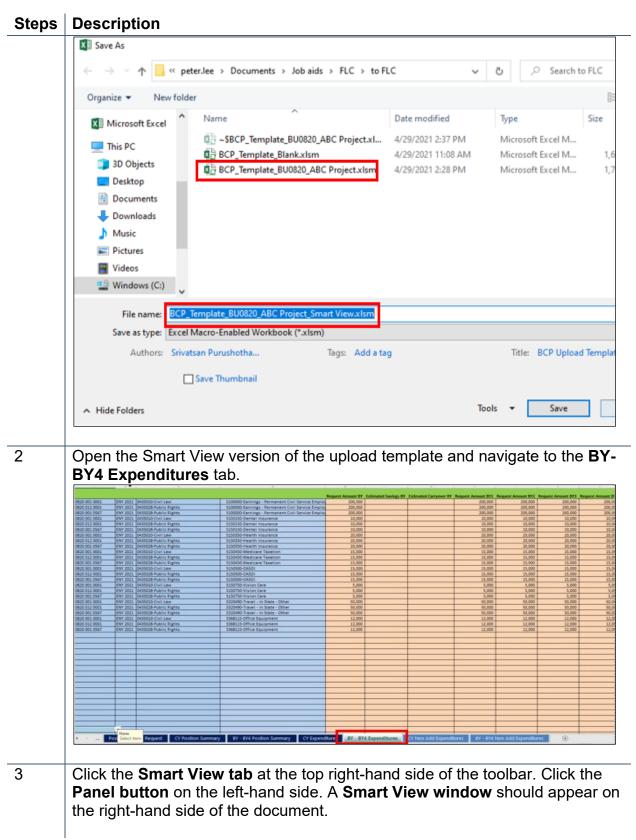
5 Use the, "BEFORE Upload Template Checklist" to ensure the BR is properly created and the upload template is populated correctly. Refer to the latest version of the "Before and After Upload Template Checklists" on Finance's "<u>FI\$Cal Resources for Budget</u>" website.

# Save an extra copy of the populated Excel template (Smart View), which you will use to connect and upload the data to Hyperion

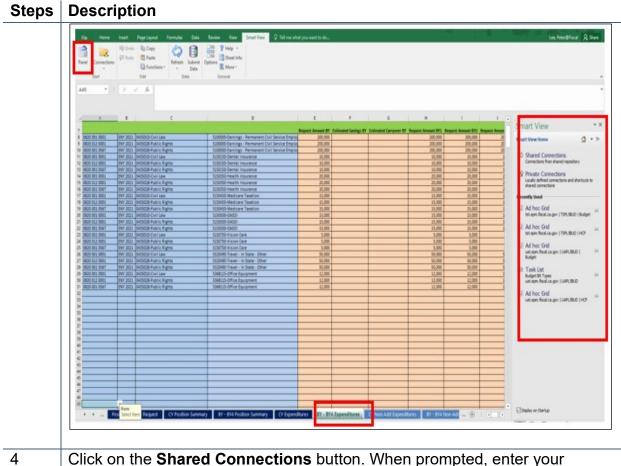
This Smart View version of the template will be used to connect to Hyperion and upload the data.

Steps	Description
1	Save the extra copy of the upload template on your computer. We recommend adding the term, "Smart View" to the end of the file name. For example, if your original excel file is named, "BCP_Template_BU0820_ABC Project", this extra copy could be named, "BCP_Template_BU0820_ABC Project_Smart View." Note: This step is critical because if you connect the original Excel file to Hyperion, all of the populated data will be lost and not be retrievable. The original version will have your source data, and the Smart View version will be the file connected to Hyperion.
	to Hyperion, all of the populated data will be lost and not be retrievable The original version will have your source data, and the Smart View









Click on the **Shared Connections** button. When prompted, enter your Hyperion User Name and Password. Click the Connect button. (Make sure the URL address is:

<u>https://epm.fiscal.ca.gov/workspace/SmartViewProviders</u>. If not, check your Excel Smart View settings by reviewing the latest version of the "FI\$Cal.079 – Configure Microsoft Excel Smart View Settings for Hyperion" job aid.



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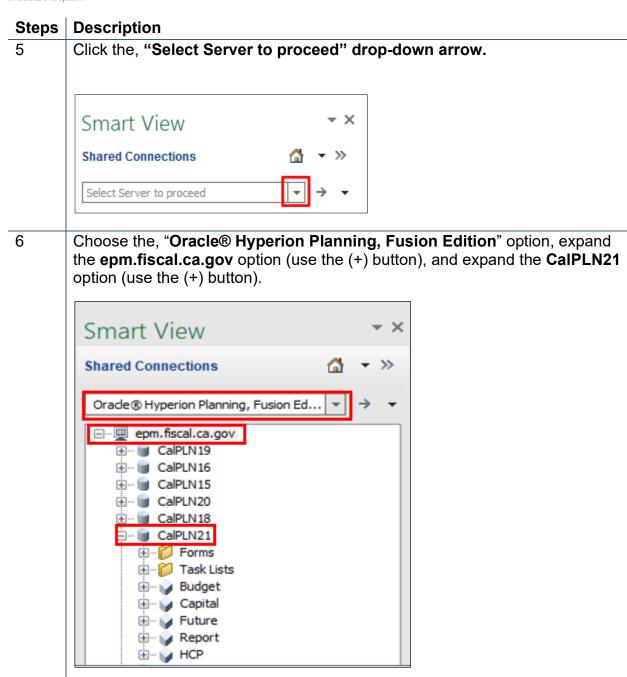


Cone state. One system I agree to the Financial Information System for Californi System Use and Privacy Policy This is a State of California, Department of FI\$Cal computer system, which may be accessed and used only for official Government business by authorized personnel. Unauthorized access or use of the computer system may subject violators to criminal 1, civil, and/or administrative action. All information on this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including criminal investigations. Access or use of this computer system by any person whether authorized or unauthorized constitutes consent to these terms. You are advised to read the <b>Privacy</b> Notice regarding the personally identifiable information that we collect, maintain and use.	~	Welcome Enter your Single Sign-On credentials below Username: Password:	
CA Penal Code §502 Unauthorized Computer Access and Fraud. Click to view full Privacy Policy Agree Copyright © 1995, 2021. Oracle and/or its affiliates. All rights re Oracle is a registered trademark of Oracle Corporation and/or		tes. Other names may be trademarks of their respective owners.	

If unable to log in, please go to the latest version of the "FISCal.079 -Configure Microsoft Excel Smart View Settings for Hyperion" job aid by navigating to the FI\$Cal Learning Center login page <u>FI\$Cal Learning Center</u> <u>Website</u> link, entering your FI\$Cal user name, password, click login, selecting By Business Process under Browser Training, selecting Hyperion Budgeting (BU) link, select the job aid "FISCal.079 - Configure Microsoft Excel Smart View Settings for Hyperion" job aid to properly configure the settings.).

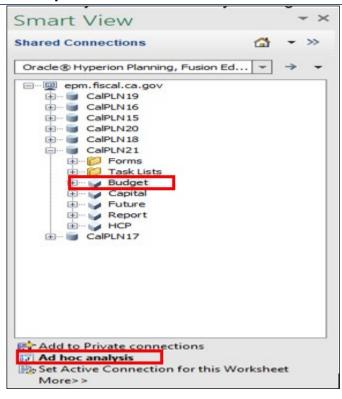
**Note:** In the Option Advance setting's URL address, make sure that the URL address is: **https://epm.fiscal.ca.gov/workspace/SmartViewProviders**.





7 Double left click on the **Budget** option, and click on the **Ad hoc analysis** option at the bottom. Each tab containing data needs to be connected individually to Smart View by clicking the Ad hoc analysis option.





8

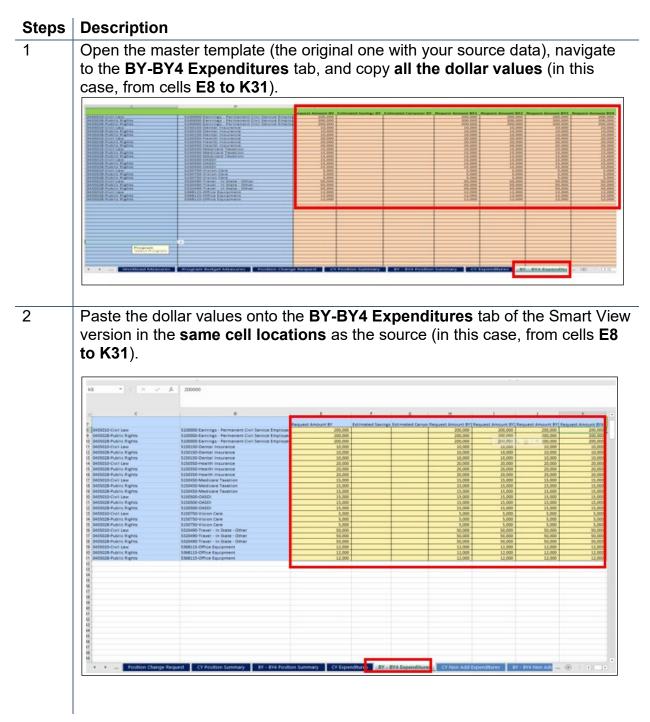
Close the pop-up refresh window by clicking the "**X**" in the top right-hand corner. (#Missing appears in the data cells, which means that the Smart View template is connecting to Hyperion and no data is in the BR, yet.)

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# Copy and paste your data from your master template (the original one with your source data) into the Smart View version, and upload the connected version

Each tab containing data needs to be uploaded individually as shown in steps 1-4.





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upload template. Note the upload template values changed to a light-yellow background color after uploading signifying the upload into the Hyperion BR



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shared connections from Budget to HCP by double left clicking on **HCP**. Click on **Ad hoc analysis**. Close the pop-up refresh window.

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7

Repeat steps 1 through 4 to upload Position Change Request data. Users need to make sure that all of the position data is copied and pasted to the same cell locations as in the master template. Otherwise, the source data will not be correctly uploaded to Hyperion.

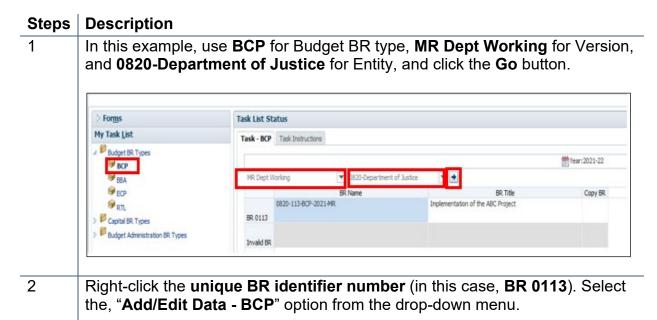
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# Validate loaded data in Hyperion to ensure that all of your data was correctly uploaded

Log in to Hyperion and navigate back to the appropriate parameters.





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# Appendix

## **Key Words**

N/A

# **Definitions**

N/A

### **Reference Materials**

#### FI\$Cal Learning Center website

FISCal.079 - Configure Microsoft Excel Smart View Settings for Hyperion

## **Revision Table**

Date	Version	Update Description
09/25/2023	8.0	Updated Department of Finance hyperlinks and narrative to be consistent with the current process.
04/13/2023	7.0	Updated Department of Finance hyperlinks. Added steps for FI\$Cal Privacy Policy and sign in Welcome page, how to obtain latest upload templates from Finance.
02/10/2023	6.0	Updated title to Uploading Budget Templates in Hyperion.
02/08/2022	5.0	Updated Departments to obtain upload templates directly from Department of Finance Business Operations notification or Finance Budget Analyst.
07/09/2021	4.0	Updated narrative and screen shots to be consistent with the current process. Updated to conform to FI\$Cal Learning Center deployment.
08/15/2019	3.0	Updated narrative and screen shots to be consistent with the current process.
08/08/2018	2.0	Updated narrative and screen shots to be consistent with the current process.



# Contacts

For questions about this job aid, please contact the FI\$Cal Client Training Section at <u>FiscalLearningCenter@fiscal.ca.gov</u>